WORK 365

Take Control of Your Growing Cloud Services Business

4 Changes Microsoft Partners Need to Make **Today**

With growth, comes challenges

Whether you're an ISV or MSP, competition is fierce and Microsoft's requirements are constantly changing. As a Microsoft Partner, you've worked hard and your business is growing, which brings opportunities—but also challenges.

To truly scale, you need to get a grip on issues like:

- ✅ Revenue leakage
- ✅ Subscription changes
- ✅ Disparate systems and error-prone spreadsheets
- ✅ Accurately invoicing customers
- ✅ Repetitive, manual processes

But with so many moving parts to the business, it's not surprising that you've been having sleepless nights. We get that because we've been in your shoes.

It's time to change the way you do business

Imagine this:

- ✅ Extra money in your pocket because you've plugged revenue leaks.
- ✅ More time to help your customers succeed, instead of wasting it on repetitive tasks.
- ✅ Healthy cash flow because you're able to collect payments faster.
- ✅ Happy customers with self-serve options for managing subscriptions and licences.

Sounds pretty amazing, right? Well, you can stop dreaming because all of this is possible for you to achieve.

You need to make these 4 changes

In this ebook, we're going to dive into the 4 changes you need to make to demolish roadblocks and truly scale your business growth.
You need to:

1 Automate your systems

2 Stop revenue leakage

3 Collect cash faster

4 Provide self-service options
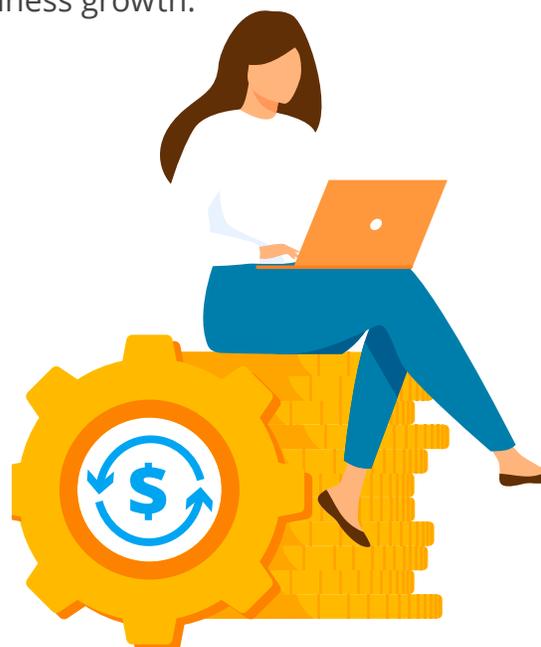
Automate your systems

If you're like most growing Microsoft Partners, you still use spreadsheets to log and record changes to subscriptions and services. Or you have separate systems for billing, provisioning, invoicing, sales, and service. The problem with this is twofold:

❶ Manually creating and sending out invoices that match customer data and subscription changes can take hours, if not days.

❷ Humans are error-prone and hate doing repetitive tasks so expensive mistakes are commonplace.

Most importantly, this process is not scalable.

From your bottom line to customer satisfaction, automation is key

A system for billing automation and subscription management is crucial if you want to grow your subscription-based business through recurring revenue.

Operating seamlessly in the background, this automated system eliminates error-prone emails and spreadsheets that can lead to revenue leakage, cash flow crunches, and, ultimately, customer confusion and dissatisfaction.

Give your customers the control they want

On the other end of the business spectrum, your customers—who are increasingly expressing a desire to manage their own licenses—are driving demand for automated self-service portals that put them in charge of services and enable them to launch and configure applications.

By automating billing and subscription management for your business, you can save hundreds of employee hours that can be used to focus on creating value for your customers and sales for your business.

Achieve operational efficiency with automation

Since moving to a fully automated billing and subscription management solution, **Innovia Consulting**, a US-based Microsoft Partner, has grown sales, saved money, increased productivity, and kept customers coming back for more with these results:

- ✅ 300% projected annual growth due to efficiencies gained by automating
- ✅ Scaled to over 6,000 new licenses with no additional staff added
- ✅ 95% reduction in average customer onboarding time
- ✅ Improved customer satisfaction

Read the full case study

Stop revenue leakage

You're likely leaking small amounts of money every day—and you may not even know it. And while $50 here and $100 there may not seem like much, it can add up to hundreds of thousands of dollars in lost revenue per year.

Did you know?

Microsoft Partners estimate they lose between 1% and 3% in recurring revenue when their billing and provisioning systems are misaligned. For a Partner making $1 million a year, that equates to $10k to $30k in lost revenue every year.

Missed invoicing opportunities key cause of revenue leakage

In the subscription business, revenue leakage comes primarily from missed invoicing opportunities, like under-invoicing or delayed invoicing. With hundreds of customers and thousands of transactions, it's hard to accurately:

- ✅ Track license changes
- ✅ Deal with proration
- ✅ Manage discounts
- ✅ Process refunds
- ✅ Provide product bundling

- ✅ Ensure timely renewals
- ✅ Bill for time
- ✅ Invoice for usage based billing (Azure)

Here are some of the causes of revenue leakage:

- ✅ Active services under inactive contracts
- ✅ Unchecked or unauthorized credit
- ✅ Under-billing customers
- ✅ Not having a standardized product catalog and price list
- ✅ Price changes from Microsoft

The good news is that revenue leakage is preventable

By automating key processes, maintaining a unified view of your customer data, and establishing a single system for everything from agreements to invoices, you can prevent revenue leakage and save thousands of dollars in lost revenue.

When selecting an all-in-one billing automation and subscription management application, it's important that the solution you choose can manage recurring billing at scale and is aligned end to end—from provisioning to invoicing.

Plug the leaks in your cloud services business with automation.

Peace of mind that invoicing is correct

Since replacing old systems with an all-in-one billing automation and subscription management solution, US-based Microsoft Partner Amaxra is now able to:

- ✔ Track down thousands of dollars in lost revenue due to invoicing errors
- ✔ Ensure invoicing and billing is correct
- ✔ Eliminate customers' billing questions with self-service portal
- ✔ Focus on providing better products and support to its customers

Download the full case study

Collect cash faster

The subscription business is about volume for Microsoft Partners. Invoices can be small and frequent. Manual or multiple billing processes are unreliable. If customers delay payments, the hit against your cash flow can be immediate. But there's an answer.

Fast, efficient, reliable invoicing

Integrating automated payment management into your billing and provisioning systems is an important way to streamline everything into one fast, efficient, and reliable process. Having a 360 degree view of all your customer data for sales, operations, accounts, finance, and support ensures that all the information is accurate, always current, and not forgotten.

This integration means your bills go to the right people, in the right way, for the right products and services, at the right time. What's more, your customers understand the invoices, and know how to pay them. You've made the process convenient and pain-free.

5 ways to collect cash faster

Implement these 5 changes so you can get paid sooner:

❶ Bill in advance

❷ Get accurate invoices out as soon as you can

❸ Don't wait to reconcile Microsoft invoices

❹ Ensure contract dates and terms are in-line with what your customer expects

❺ Accept and enable credit card and e-payment options

Consistency means cash flow

The advantage to you of integrating and automating your systems is not only consistent cash flow. It's also about building a base of satisfied customers whose ongoing subscriptions and recurring payments you can count on. Understanding their plans, priorities, and needs will fuel your growth in the future.

Accurate billing makes for faster payments

Since adopting a fully-integrated billing automation and subscription management system, 365Solutions, a UK-based Microsoft Partner, has been able to:

- ✅ Get paid faster thanks to more accurate billing and fewer invoice disputes
- ✅ Spend 80% less time on billing annually
- ✅ Save 4 hours per day on customer support due to self-service portal

Read the full case study

Provide a self-service portal

When you're competing against thousands of Microsoft Partners, customer experience is everything. What customers want most are the best possible experiences. These days, that means self-service portals. It's easy to see why.

Self-service portals create amazing experiences for your customers, enabling them to understand and manage their own information and provisioning needs in real time. It empowers them—and builds trust and transparency. It shows you're available and willing to work on their terms.

Portals put customers in charge

With self-service portals, your customers can get a grip on their subscriptions and licenses, view their invoice history, and keep track of their usage data—all on their own, and in real time. They can even manage and provision their subscriptions and services to suit their purposes and see the modifications they make immediately.

And the benefits are not just for your customers. With a self-service portal, you spend less time on repetitive tasks like provisioning license changes, sending invoices, and case resolution, and instead can spend more time meeting your customers' strategic needs—like generating new insights from trends that are relevant to your customers' priorities and areas of expertise.

You focus on the big picture

Engaging your customers directly with tailored expertise is what enables you to scale your business, building both revenue and profitability. Stop answering the same questions over and over again, and start thinking longer-term and bigger-picture.

Ultimately, the self-service advantage boils down to healthier revenues and happier customers, even as you're scaling your business for both.

Exceptional customer service with self-service

Leading system integrator for Microsoft cloud solutions and infrastructure, KPCS automated workflows and added a self-service portal which has:

- ✔ Improved customer satisfaction with ability to update their own licenses and subscription information
- ✔ Given customers room to experiment with other integrations and plugins, which will help them create new products

Read the full case study

Your next step

Getting a grip on your cloud services business is all about taking control of the challenges you're currently facing so you can grow. By automating some of the important ways you operate in today's competitive marketplace, you can scale up, save money, and make your team and their customers happier.

Let's talk

Work 365 is an integrated billing automation and subscription management software you can use to scale your Cloud Solutions business and grow recurring revenue. The software automates subscription management and billing workflows, leading to faster, more streamlined processes and increased profit margins.

Work 365 is a certified Control Panel Vendor (CPV) by Microsoft and a preferred solution on AppSource.

Schedule a demo   or   **Get in touch**

to see how Work 365 can help you become more competitive.

Mike Prachar,

COO & Director of Cloud Technologies at BigGreen IT

"*With well over 100% YoY growth in our CSP business, we had to adapt quickly. Since we were already using Dynamics as our CRM platform, we knew we needed a billing and provisioning system based on Dynamics.*

Work 365 fit the bill for us. It's far more than just CSP billing in a CRM. It's a completely built out and fully featured backend for a Microsoft CSP practice of nearly any size.

It's clear from the first day you begin onboarding that the folks behind this system are in the business themselves and have a perfect understanding of what matters most."